

# IDAHO EMPLOYMENT

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## State Overview

### IDAHO'S UNEMPLOYMENT RATE INCREASES TO 5.7 PERCENT

Idaho's seasonally adjusted unemployment rate for August 2003 was 5.7 percent, up one-tenth of a percentage point from July and the same as in August 2002. The current unemployment rate remains below the national rate of 6.1 percent, which decreased one-tenth of a percentage point from July.

There were 4,200 fewer Idahoans working in August compared to July 2003. Following a significant decrease in May and June 2003, the number of unemployed persons in Idaho began to increase in July and again in August. The current level of 39,100 unemployed persons is an increase of 400 persons from July and 1,400 from June. For the same time period, the number of employed persons decreased by 1,000 in June and 4,200 in July and August. These changes resulted in a *Civilian Labor Force* of 685,100 in August, down 3,800 persons from July and 5,000 below June. This is the fifth straight monthly decrease in Idaho's *Civilian Labor Force*.

The seasonally adjusted *Civilian Labor Force* declined also from July to August, 2002. Prior to then, the norm had been a 1,000-to-2,000-person increase with an occasional marginal drop in some years. The overall economic conditions one year ago were much the same as this year in that the unemployment rates were slightly below 6.0 percent and employment declined between the months, but the number of unemployed persons did not change much. Some seasonal factors tend to decrease the labor force in August: summer school is over, people are traveling on vacations, and some youth quit their summer jobs to prepare for school.

However, there were some atypical factors combined to cause the monthly decrease in the labor force this year. It is likely that some Idahoans are dropping out of the labor force because they cannot find jobs, thereby causing a large numerical drop in employment, but there has not been a comparable numerical change in unemployment as evidenced by the marginal rate increase that has taken place. The number of jobs in *Agriculture* in August is forecast to decrease 1,100 from July as demand for irrigators and field workers decreased. Harvest activities began in mid-August, which is earlier than normal due to the above average hot weather and lack of irrigation water in some areas of the state. Because of the numerous forest fires in North Idaho, hoot owl restrictions were in effect, thus reducing logging activity. Loggers in North Central Idaho were not permitted in the woods to log at all because of the fires.

Mirroring the national jobless recovery, Idaho's job market has been slowly recovering from the recession, but it has not been a totally jobless recovery. From one year ago, the number of persons employed has increased by 1,600. Even with numerous layoffs to date in 2003, the number of persons unemployed actually decreased by 100 from August 2002. As a

result of the changes in the number of persons employed and unemployed, Idaho's *Civilian Labor Force* shows an increase of 0.2 percent, or 1,500, since August 2002. Nationally, the number of people employed increased by nearly 900,000 between August 2002 and August 2003. This was a 0.6 percent increase compared to a 0.2 percent increase in Idaho. The number of people unemployed increased 6.4 percent nationally compared to a 0.3 percent decrease in Idaho.

## AREA AND COUNTY LABOR FORCE DEVELOPMENTS

*State Table 1 on page 3 provides the month's labor force statistics for Idaho counties, designated labor market areas, and selected cities.*

Two northern Idaho Labor Market Areas (LMAs) continued their competition for the area with the highest unemployment rate. Both the Panhandle LMA and the Idaho-Lewis LMA had an August unemployment rate of 8.6 percent, so the dubious distinction must be shared. On the other hand, the Bonneville LMA in eastern Idaho had the lowest rate at 3.5 percent. The Boise City Metropolitan Statistical Area's (MSA's) 5.5 percent unemployment rate was below the state's average.

These same LMAs and the Boise MSA have consistently experienced similar unemployment rates in the state for the last 12 months. Either the Panhandle or Idaho-Lewis LMA has had the highest rate, which has averaged 8.1 percent for Idaho-Lewis and 8.0 for Panhandle for the previous 12 months. The Bonneville LMA's unemployment rate has averaged 3.7 percent. The Boise MSA's average rate of 5.4 percent is below the state's 5.6 percent average rate.

Five Idaho counties experienced double-digit unemployment rates in August. Shoshone County is forecast to have an unemployment rate of 15.9 percent in August, up from 14.8 percent in July and 12.2 percent in August 2002. Adams County's rate of 15.6 percent is unchanged from July, but down slightly from 15.7 percent in August 2002. Washington County is forecast to experience 15.0 percent unemployment in August compared to 11.2 percent in July and 11.3 percent in August 2002. Payette County's rate of 12.6 percent is up from 11.0 percent in July and 10.2 percent in August 2002. Clearwater County's rate of 11.2 percent was up from 10.2 percent in July, but down from 14.4 percent in August 2002.

Three counties were forecast to have an unemployment rate at or below 3.0 percent. Oneida County's rate of 2.9 percent is down from the 3.1 percent in July and 4.0 percent in August 2002. Owyhee County is forecast to experience 2.2 percent unemployment in August 2003 compared to 2.4 percent in July and 5.9 percent in August 2002. Madison County's unemployment rate dropped to 1.3 percent in August from 2.5 percent in July and 2.1 percent in August 2002.

## NONFARM INDUSTRY EMPLOYMENT DEVELOPMENTS

*State Table 2 on page 5 provides state industry employment data for the current month, previous month, and one year ago.*

The number of *Nonfarm Payroll Jobs* increased about 0.6 percent, or 3,400 jobs, from July to August 2003. The *Goods-Producing Industries* added 900 jobs for a 0.9 percent growth rate. The *Service-Providing Industries* job growth measured 2,500 jobs for a 0.5 percent increase. The year-over-year comparison shows a net increase of 2,200 in total *Nonfarm Payroll Jobs*. This is a 0.4 percent increase. However, the *Goods-Producing Industries* continued to have fewer jobs than the year before—3,600 less—which indicates the effects of the national recession on Idaho's electronics industries and the long-term decline in the natural resource industries still linger.

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*Construction* continued to exhibit exceptional strength as its employment level reached a new high for the year. With the addition of 700 jobs, *Construction* employment totaled 41,100 in August 2003. All aspects of the *Construction* industry added jobs, but the *Specialty Trade Contractors* segment added the most at 380 new jobs. Summer is the time for road and bridge building and repair, and those categories added about 250 jobs. There are various building projects underway at the state's universities and colleges, commercial building projects are occurring in all of the larger cities, and residential construction and remodeling remains strong.

Quite the opposite continues to occur in some Idaho industries often associated with building construction, such as *Logging* and *Wood Products Manufacturing* industries. With the exception of 100 additional jobs in *Sawmills*, employment was flat between July and August. Yet, there has been a sharp increase in prices for lumber and wood panel products nationally, especially plywood and oriented-strand board, also known as OSB. Record numbers of housing starts and extraordinary demand because of storms and the Iraqi war have depleted many wholesale inventories. Production will increase, but how that translates into new jobs remains to be seen as existing capacity is thought to be able to meet the increased demand. In addition, the estimated 500 year-over-year job loss in *Logging* is attributable to the number and location of forest fires in Northern Idaho because they occurred in or near hoot owl restricted areas where logging was temporarily banned.

*Computer & Electronics Products Manufacturing* maintained its 16,000 jobs level from July to August 2003. Some of Idaho's electronic firms, both large and small, recently have been reporting a variety of good news ranging from sales increases, quarter profitability, new product rollouts, and tentative plans for some expansion. This industry has been stable for most of 2003, but is still showing effects of the national recession as evidenced by the year-over-year loss of 2,000 jobs.

Above average hot weather during early August and low water and irrigation conditions resulted in earlier-than-usual harvests of some crops and fruits. Potato harvest started in some areas, and the components of Idaho's agricultural product storage, processing, and distribution systems were readying for their peak seasons. Yet, the August employment level in *Food Manufacturing* did not change from July, but was 700 jobs lower than August 2002. Several potato processing plants have closed or had significant layoffs, mainly due to the drop in demand for frozen French fried potatoes. Cheese factory employment has been up and down, and the amount of red meat at packing plants and in feedlots was down from previous months and from the year before. *Food Manufacturing* employment is likely to decline even more in the coming months as some announced layoffs and plant closures will be completed.

State Table 1: August 2003 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
<b>Seaport LMA</b>	35,665	1,756	4.9	33,909
Nez Perce County	23,383	943	4.0	22,440
Asotin County, WA	12,283	813	6.6	11,470
<b>Boise City MSA</b>	243,333	13,349	5.5	229,984
Ada County	174,664	8,476	4.9	166,188
Canyon County	68,669	4,874	7.1	63,795
<b>Pocatello City MSA*</b>	39,928	2,202	5.5	37,726
<b>Bonneville LMA</b>	80,472	2,843	3.5	77,629
Bingham County	22,238	925	4.2	21,313
Bonneville County	46,523	1,530	3.3	44,994
Butte County	1,554	77	4.9	1,478
Jefferson County	10,156	311	3.1	9,845
<b>Cassia-Minidoka LMA</b>	20,276	1,584	7.8	18,691
Cassia County	10,154	698	6.9	9,455
Minidoka County	10,122	886	8.8	9,236
<b>Idaho-Lewis LMA</b>	8,407	723	8.6	7,684
Idaho County	6,918	668	9.7	6,251
Lewis County	1,489	55	3.7	1,434
<b>Panhandle LMA</b>	93,963	8,086	8.6	85,877
Benewah County	4,232	351	8.3	3,882
Bonner County	18,145	1,597	8.8	16,548
Boundary County	4,426	345	7.8	4,081
Kootenai County	60,310	4,705	7.8	55,605
Shoshone County	6,850	1,088	15.9	5,762
<b>Magic Valley LMA</b>	54,046	2,050	3.8	51,995
Gooding County	7,596	284	3.7	7,312
Jerome County	10,123	461	4.6	9,663
Twin Falls County	36,326	1,305	3.6	35,021
Adams County	1,846	288	15.6	1,558
Bear Lake County	3,004	141	4.7	2,863
Blaine County	12,498	534	4.3	11,963
Boise County	2,633	197	7.5	2,437
Camas County	413	22	5.3	391
Caribou County	3,175	224	7.1	2,951
Clark County	522	22	4.2	501
Clearwater County	3,794	425	11.2	3,369
Custer County	2,193	131	6.0	2,062
Elmore County	9,823	652	6.6	9,172
Franklin County	5,349	170	3.2	5,179
Fremont County	4,916	208	4.2	4,709
Gem County	6,104	465	7.6	5,638
Latah County	16,597	595	3.6	16,002
Lemhi County	3,746	228	6.1	3,518
Lincoln County	2,213	110	5.0	2,103
Madison County	11,891	159	1.3	11,732
Oneida County	1,687	49	2.9	1,638
Owyhee County	4,153	90	2.2	4,063
Payette County	9,505	1,200	12.6	8,305
Power County	3,245	299	9.2	2,946
Teton County	3,758	125	3.3	3,633
Valley County	3,985	334	8.4	3,651
Washington County	4,244	637	15.0	3,607
<b>State of Idaho</b>	<b>685,125</b>	<b>39,084</b>	<b>5.7</b>	<b>646,041</b>
<b>Idaho Cities</b>				
Boise	117,990	5,401	4.6	112,588
Coeur d'Alene	21,298	1,263	5.9	20,036
Idaho Falls	29,824	994	3.3	28,830
Lewiston	19,997	699	3.5	19,298
Nampa	21,029	1,604	7.6	19,426
Pocatello	28,783	1,541	5.4	27,242
Twin Falls	18,939	698	3.7	18,241

\* Pocatello MSA includes all of Bannock County.

All but a few components of the *Service-Providing Industries* had increased employment levels from July 2003 and in comparison to August 2002. The public sector accounted for all the significant job losses for both the month and the year as usual seasonal factors contributed to the decrease in education employment, and budgetary limitations affected both education and administration. The budget effects are best seen in the year-over-year comparisons in *State and Local Government* that show a loss of 1,000 jobs in spite of continuing population growth throughout the state.

The *Administrative & Support Services* industries include stand-alone call centers and personnel agencies that provide temporary workers to other business. These two types of enterprises combined to add 1,900 jobs from July and 2,100 jobs from August 2002. This translates into a 5.6 percent and 6.2 percent growth rate, respectively. Most of the additional jobs have occurred in the personnel services category and reflects the state's improving economic condition. Call centers have recently experienced a business contraction and jobs have been lost. More job loss is expected as the Federal Trade Commission's "do not call list" program becomes fully implemented.

*Leisure & Hospitality* added jobs both on a month-over-month and year-over-year basis. August is the high point for summer recreation and tourism businesses, so a seasonal employment increase is expected. The year-over-year increase is due to a recovery from the shock of the September 11, 2001, events and strong consumer confidence. Soaring gasoline prices apparently did not have a significant adverse affect on tourism-related employment.

#### ANOTHER LOOK AT EMPLOYMENT CHANGES

Idaho added 2,200 jobs from August 2002 to August 2003. This is a 0.4 percent annualized job growth rate. Between July and August 2003, the job count increased by 3,400, or 0.6 percent, for the month. These might not be large changes (the numbers just aren't very large considering a total job count of about 578,000), but they might be significant changes because they represent positive growth and continue a trend of increasing job growth since the beginning of the year.

Consider the monthly estimates for total *Nonfarm Payroll Jobs* for 2003. An eight-month gain of 27,400 jobs, as shown in State Table 4, looks far more impressive than the August 2002 to August 2003 gain of 2,200 jobs listed on State Table 2 on page 5. The 5.0 percent job growth rate so far in 2003 dwarfs the 0.4 percent gain in the year-over-year comparison. With a little arithmetic, the year-to-date numbers can be converted to read *aver-*

*age monthly change* = 3,425 and *average monthly percentage change* = 0.6 percent. These numbers now look more like the monthly employment numerical change of 3,400 and percentage change of 0.6 percent presented in State Table 2 on page 5.

The bottom line is that Idaho has been experiencing a period of modest job growth so far in 2003. When the number of jobs exceeds 579,436, the state will have attained a new high in the job count. The current high mark was set in September 2001.

#### Agriculture

Agriculture employment declined in August from July as an estimated 1,120 hired workers were idled. The unseasonably hot weather and existing low water and drought conditions in some areas caused an earlier end to the growing season and an earlier start to harvest. This in turn caused a change in the demand for farm workers in that fewer irrigators are needed and crop sorters and packers are in more demand.

The Idaho Agricultural Statistics Service filed this report about mid-August prices received by farmers:

*Preliminary indications of prices received by Idaho farmers for the month of August showed increases for alfalfa hay, all barley, malting barley, dry beans, potatoes, all wheat, beef cattle, steers and heifers, calves and all milk. Price declines were recorded for feed barley and cows. (Agriculture In Idaho, 9/17/03)*

Agricultural production for most crops is up, but there are some concerns expressed about how this summer's hot weather affected crops. For example, it has been reported that potatoes harvested early are good quality, but smaller in size. It is still too early to tell how the Idaho 2003 season fared in terms of product sales and producer earnings.

Now is the time to obtain information—and lots of it—on the 2002 season and on Idaho agriculture in general. The Idaho Department of Agriculture has released the 2003 *Idaho Agricultural Statistics* annual bulletin. It is available on-line at: <http://www.nass.usda.gov/id/>.

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State Table 4: Total Nonfarm Payroll Jobs, Idaho, 2003									
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	YTD	YTD
Revised	Revised	Revised	Revised	Revised	Revised	Revised	Prelim	# Chg	% Chg
550,400	552,500	557,200	563,400	568,700	576,500	574,400	577,800	27,400	5.0

State Table 2: Nonfarm Payroll Jobs

% Change From

BY PLACE OF WORK	Aug 2003*	July 2003	Aug 2002	Last Month	Last Year
<b>Nonfarm Payroll Jobs**</b>	577,800	574,400	575,600	0.6	0.4
<b>GOODS-PRODUCING INDUSTRIES</b>	106,500	105,600	110,100	0.9	-3.3
<b>Natural Resources &amp; Mining</b>	3,700	3,700	4,300	0.0	-14.0
Logging	1,900	1,900	2,400	0.0	-20.8
Mining	1,800	1,800	1,900	0.0	-5.3
Metal Ore Mining	500	500	500	0.0	0.0
<b>Construction</b>	41,100	40,400	40,200	1.7	2.2
<b>Manufacturing</b>	61,700	61,500	65,600	0.3	-5.9
Durable Goods	38,000	37,800	40,800	0.5	-6.9
Wood Product Manufacturing	7,500	7,400	7,800	1.4	-3.8
Sawmills & Wood Preservation	3,000	2,900	3,200	3.4	-6.3
Veneer & Engineered Products	1,400	1,400	1,300	0.0	7.7
Other Wood Product Manufacturing	3,100	3,100	3,300	0.0	-6.1
Fabricated Metal Product Manufacturing	3,700	3,600	3,800	2.8	-2.6
Machinery Manufacturing	2,700	2,700	2,900	0.0	-6.9
Computer & Electronic Product Manufacturing	16,000	16,000	18,000	0.0	-11.1
Transportation Equipment Manufacturing	2,300	2,300	2,200	0.0	4.5
Other Durable Goods	5,800	5,800	6,100	0.0	-4.9
Nondurable Goods	23,700	23,700	24,800	0.0	-4.4
Food Manufacturing	15,800	15,800	16,500	0.0	-4.2
Fruits & Vegetable Preserving & Specialty	8,400	8,300	8,600	1.2	-2.3
Paper Manufacturing	1,700	1,700	1,700	0.0	0.0
Printing & Related Support Activities	2,100	2,100	2,000	0.0	5.0
Chemical Manufacturing	1,800	1,800	1,900	0.0	-5.3
Other Nondurable Goods	2,300	2,300	2,700	0.0	-14.8
<b>SERVICE-PROVIDING INDUSTRIES</b>	471,300	468,800	465,500	0.5	1.2
<b>Trade, Transportation, &amp; Utilities</b>	116,900	116,700	117,000	0.2	-0.1
Trade	98,100	98,100	98,100	0.0	0.0
Wholesale Trade	24,700	24,900	24,900	-0.8	-0.8
Wholesalers, Durable Goods	11,700	11,700	11,900	0.0	-1.7
Wholesalers, Nondurable Goods	11,000	11,300	11,200	-2.7	-1.8
Retail Trade	73,400	73,200	73,200	0.3	0.3
Motor Vehicle and Parts Dealers	10,700	10,600	10,900	0.9	-1.8
Building Material and Garden Equipment	8,500	8,400	7,900	1.2	7.6
Food & Beverage Stores	12,600	12,600	12,700	0.0	-0.8
General Merchandise Stores	15,300	15,100	14,700	1.3	4.1
Transportation, Warehousing, & Utilities	18,800	18,600	18,900	1.1	-0.5
Utilities	1,900	1,900	2,000	0.0	-5.0
Transportation & Warehousing	16,900	16,700	16,900	1.2	0.0
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,600	8,500	8,300	1.2	3.6
<b>Information</b>	9,200	9,300	9,200	-1.1	0.0
Telecommunications	3,200	3,200	3,200	0.0	0.0
<b>Financial Activities</b>	27,400	27,300	26,300	0.4	4.2
Finance & Insurance	20,300	20,200	19,400	0.5	4.6
Real Estate & Rental & Leasing	7,100	7,100	6,900	0.0	2.9
<b>Professional &amp; Business Services</b>	75,000	73,000	71,800	2.7	4.5
Professional, Scientific, & Technical	29,400	29,300	28,400	0.3	3.5
Scientific Research & Development	7,400	7,400	7,400	0.0	0.0
Management of Companies & Enterprises	8,800	8,800	8,600	0.0	2.3
Administrative & Support & Waste Management	36,800	34,900	34,800	5.4	5.7
Administrative & Support Services	35,800	33,900	33,700	5.6	6.2
Educational & Health Services	60,100	60,100	59,100	0.0	1.7
Educational Services	5,200	5,200	5,000	0.0	4.0
Health Care & Social Assistance	54,900	54,900	54,100	0.0	1.5
Hospitals	13,400	13,400	13,300	0.0	0.8
Leisure & Hospitality	59,100	58,400	57,800	1.2	2.2
Arts, Entertainment, & Recreation	9,500	9,400	8,900	1.1	6.7
Accommodation & Food Services	49,600	49,000	48,900	1.2	1.4
Accommodation	8,700	8,700	8,600	0.0	1.2
Food Services & Drinking Places	40,900	40,300	40,300	1.5	1.5
Other Services	18,600	18,200	18,500	2.2	0.5
<b>Total Government</b>	105,000	105,800	105,800	-0.8	-0.8
Federal Government	15,200	14,700	15,000	3.4	1.3
State & Local Government	89,800	91,100	90,800	-1.4	-1.1
State Government	26,500	26,600	26,700	-0.4	-0.7
State Government Education	11,100	11,400	11,000	-2.6	0.9
State Government Administration	15,400	15,200	15,700	1.3	-1.9
Local Government	63,300	64,500	64,100	-1.9	-1.2
Local Government Education	29,500	31,100	30,200	-5.1	-2.3
Local Government Administration	30,800	30,400	31,200	1.3	-1.3
Local Government Tribes	3,000	3,000	2,700	0.0	11.1

\*Preliminary Estimate

\*\* Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 3: Economic Indicators

	Aug 2003	July 2003	Aug 2002	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE <sup>(1)</sup>					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	685,100	688,900	683,600	-0.6	0.2
Unemployment	39,100	38,700	39,200	1.0	-0.3
Percent of Labor Force Unemployed	5.7	5.6	5.7		
Total Employment	646,000	650,200	644,400	-0.6	0.2
<i>Unadjusted</i>					
Civilian Labor Force	694,800	700,500	693,200	-0.8	0.2
Unemployment	35,000	34,500	35,200	1.4	-0.6
Percent of Labor Force Unemployed	5.0	4.9	5.1		
Total Employment	659,800	666,000	658,000	-0.9	0.3
U. S. UNEMPLOYMENT RATE <sup>(2)</sup>	6.1	6.2	5.8		
U.S. CONSUMER PRICE INDEX <sup>(2)</sup>					
Urban Wage Earners & Clerical Workers (CPI-W)	180.3	179.6	176.6	0.4	2.1
All Urban Consumer (CPI-U)	184.6	183.9	180.7	0.4	2.2
AGRICULTURE					
Agriculture Employment	45,640	46,760	41,690	-2.4	9.5
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	360	360	670	0.0	-46.3
Hired Workers	36,270	37,390	32,010	-3.0	13.3
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims <sup>(3)</sup>	9,020	10,692	9,057	-15.6	-0.4
Weeks Claimed <sup>(4)</sup>	71,443	78,289	70,639	-8.7	1.1
<i>Benefit Payment Activities<sup>(5)</sup></i>					
Weeks Compensated	59,892	77,162	58,958	-22.4	1.6
Total Benefit \$ Paid	\$13,029,087	\$16,895,210	\$12,589,314	-22.9	3.5
Average Weekly Benefit Amount	\$217.54	\$218.96	\$213.53	-0.6	1.9
Covered Employers	41,393	41,164	40,306	0.6	2.7
Total Benefit \$ Paid During Last 12 Months <sup>(4)</sup>	\$215,917,052	\$215,477,279	\$207,152,367	0.2	4.2

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities



# PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

## EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rate rose from 8.2 percent in July to 8.6 percent in August because high fire danger required hoot owl restrictions on logging and other forest activities, the Galena Mine laid off 26 miners, Tele-Servicing Innovations closed its Smelterville call center, and Center Partners began reducing employment at its Kootenai County call centers. Despite the increase between July and August, the unemployment rate remained below the August 2002 rate of 9.0 percent. Growth in the tourism sector, along with surging construction and real estate activity, helped Panhandle residents find employment during the last year.

Panhandle Table 1 shows the decline in high-paying *Natural Resources & Mining* and *Wood Products* jobs between August 2002 and August 2003. With lumber and plywood prices rising rapidly during recent months, there is good reason to hope that most *Wood Products* manufacturers will be able to hold employment steady for the rest of 2003. After two years of large losses, *Other Manufacturing* jobs have stabilized. Between August 2002 and August 2003, job gains in Bonner County's manufacturing sector offset job losses in Kootenai County's manufacturing sector. *Trade, Transportation, & Utilities* stagnated during the last couple of years. With the economy picking up steam, these sectors should add jobs in the next few months. *Financial Activities*—which includes banks, insurance, and real estate—has benefited from low mortgage rates and the resulting real estate boom of the last two years. *Construction* also benefited from low mortgage rates. With people continuing to move into the Panhandle, *Health Services*, *Other Services*, and *Government*, especially public schools, have expanded employment. The largest source of new jobs between 2000 and 2002, *Professional & Business Services*, lost jobs in recent months as call centers and other business service providers downsized.

## AREA DEVELOPMENTS

### Benewah County

- Dwaine Sieler recently opened a photography studio in St. Maries. Sieler's extensive experience includes portrait, wedding, event, architectural, and commercial photography.

Panhandle Table 1: Labor Force & Employment

	Aug 2003*	July 2003	Aug 2002	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	93,970	93,240	92,480	0.8	1.6
Unemployed	8,090	7,660	8,300	5.6	-2.5
% of Labor Force Unemployed	8.6	8.2	9.0		
Total Employment	85,880	85,580	84,180	0.4	2.0
<b>Unadjusted</b>					
Civilian Labor Force	95,250	94,790	94,030	0.5	1.3
Unemployed	5,870	5,820	6,130	0.9	-4.2
% of Labor Force Unemployed	6.2	6.1	6.5		
Total Employment	89,380	88,970	87,900	0.5	1.7
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	72,620	72,220	71,280	0.6	1.9
<b>Goods-Producing Industries</b>	13,810	13,640	13,800	1.2	0.1
Natural Resources & Mining	1,550	1,600	1,700	-3.1	-8.8
Construction	5,410	5,270	5,120	2.7	5.7
Manufacturing	6,850	6,770	6,980	1.2	-1.9
Wood Product Manufacturing	2,820	2,680	2,960	5.2	-4.7
Other Manufacturing	4,030	4,090	4,020	-1.5	0.2
<b>Service-Providing Industries</b>	58,810	58,580	57,480	0.4	2.3
Trade, Transportation, & Utilities	13,520	13,390	13,430	1.0	0.7
Wholesale Trade	1,400	1,410	1,390	-0.7	0.7
Retail Trade	10,370	10,280	10,360	0.9	0.1
Utilities	390	390	380	0.0	2.6
Transportation & Warehousing	1,360	1,310	1,300	3.8	4.6
Information	1,210	1,200	1,260	0.8	-4.0
Financial Activities	3,040	3,090	2,910	-1.6	4.5
Professional & Business Services	6,890	6,980	7,270	-1.3	-5.2
Educational & Health Services	7,320	7,070	6,770	3.5	8.1
Leisure & Hospitality	10,270	10,110	9,750	1.6	5.3
Other Services	2,570	2,620	2,390	-1.9	7.5
Government Education	3,920	4,020	3,800	-2.5	3.2
Government Administration	8,880	8,950	8,750	-0.8	1.5
Government Tribes	1,190	1,150	1,150	3.5	3.5

\* Preliminary estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

## EDITOR'S NOTE:

In last month's Panhandle report, a reference was made to *hoot owl* restrictions on logging in North Idaho. In the editing process, that was changed to a reference of logging restrictions imposed by the U.S. Fish and Wildlife Service in some areas of the country where the habitat of the *northern spotted owl* is threatened. The two have nothing to do with each other. In reality, as many North Idaho residents know, *hoot owl* restrictions refer to a provision of Stage II fire restrictions imposed when conditions are extremely dry. The provision reads: "Operating a chainsaw or welder is PROHIBITED between 1 p.m. and 1 a.m. Referred to as *hoot owl* restrictions, you can use these tools after 1 a.m. until 1 p.m.—be sure to monitor the area for one hour after stopping work to make sure there were no sparks that are fanned to flame." (Definition provided by the USDA Forest Service, Coeur D'Alene Interagency Fire Prevention & Information Team.)

The mistake was most regrettable.

- Editor



## **Bonner County**

- Panhandle Forest Products of Cocalalla recently received a \$30,000 National Fire Plan grant. The U.S. Forest Service awards the grants to companies that use small logs with low commercial value in innovative projects. The logs are from harvests to reduce fuel in overgrown forests. Panhandle Forest Products will use the grant to purchase equipment to make colored wood mulch for landscaping. Its other products include fencing and logs for furniture and log homes. Bonner County Economic Development Corporation helped the company secure the grant.
- Smart Plugs Inc., of Sandpoint, has created a spark plug that doesn't spark. Smart Plugs can replace traditional spark plugs in almost any internal combustion engine, making it run more efficiently and cleanly using a variety of fuels. Smart Plug's first commercial market was experimental airplanes because the plugs run without magnetos, a frequent source of engine failures. Now many other commercial and defense applications are being explored. Smart Plug customers include the U.S. Army, NASA, and the Environmental Protection Agency.

## **Boundary County**

- A forest fire ignited west of Bonners Ferry on September 2. The fire grew so large that the U.S. Forest Service dispatched a type 1 national level firefighting team to the Panhandle National Forest for the first time in 35 years. More than 700 firefighters battled the blaze, which burned 3,800 acres and threatened several buildings. It took more than two weeks to bring the fire under control. The cost of fighting the fire exceeded \$2 million. The fire damaged 15 percent of the Myrtle Creek watershed that provides drinking water to 5,000 people. Idaho Governor Dirk Kempthorne declared a state of emergency on September 12 to help the City of Bonners Ferry obtain funding to ensure the quality of its water supply. The city is exploring several options to guarantee the quality of its drinking water.
- Leonard LowenShaw recently began an additional business at LowenShaw's Vineyards Retreat & RV Park at Blue Lake, eight miles south of Bonners Ferry. The new business is an organic winery that eventually could produce 3,000 cases of red and white wine a year. The winery would be the only one in the Idaho Panhandle that grows its own grapes. The winery estimates it will hire 20 people for harvest, and employ four people year-around.

## **Kootenai County**

- The Coeur d'Alene Tribe opened the 18-hole Circling Ravens Golf Course near its Worley casino in August. The casino currently is adding 27,000-square feet to house 400 new video gaming machines, bringing the casino's total number of machines to 1,800. Next door, 100 rooms are being added to the hotel, doubling its size. The expansion projects will be completed early in 2004. Before this summer, the tribe employed about 550 people in Worley; now it employs more than 700 people there.
- Harrison, a town of 270 residents on the southern shore of Lake Coeur d'Alene, recently earned the Gem Community designation, indicating it completed extensive planning for economic development. Among Harrison's eco-

nomic development goals are upgrading the RV park along the city's waterfront and building an addition on the town's historic gymnasium to make it a community center. Landscaping and beautification projects already are underway. During the last two years, several new docks have replaced the old city docks.

- Coeur d'Alene's Dirne Community Health Clinic recently received a \$567,000 grant from the U.S. Department of Health and Human Services to expand its services. The grant will allow the medical clinic to be open five full days a week, rather than the current three days a week. Since it opened in 1989, the clinic has served people without health insurance. From now on, it also will serve Medicare and Medicaid clients. To expand its service, the clinic is hiring 16 people.
- Northwest Specialty Hospital opened in early October at 1593 Polston Avenue in Post Falls. The 47,000-square-foot hospital, which conducts non-emergency surgeries, contains four operating rooms, two procedure rooms, twelve patient rooms, and a recovery room. It employs about 70 people. Construction soon will begin on a 30,000-square-foot medical office building that will be connected to the hospital by a corridor, and should open in the spring.
- North Idaho's low cost of doing business and lifestyle amenities continue to attract new businesses. Aspen Benefits recently moved from Yakima, Washington, to 7600 Mineral Drive in Coeur d'Alene. The manufacturer and marketer of nutritional supplements and skin care products employs 14 people. It expects to double in size every two years. Global Digital Solutions will move its headquarters from southern California to downtown Coeur d'Alene by early 2004. The company makes training videos for the construction industry and documentaries for nonprofit and Christian organizations in 28 different languages. Global Digital Solutions CEO Marcus Veigh is bringing four employees and will hire another five workers.

## **Shoshone County**

- Shoshone Medical Center (SMC) recently began construction of an \$18 million 25-bed hospital to replace its current building on a 20-acre site at Jacobs Gulch in Kellogg. The new 39,000-square-foot hospital will replace the current 45,000-square-foot, 25-bed hospital that was built in 1958. Construction is slated for completion in fall 2004. The new building will reflect SMC's recent emphasis on providing outpatient services and emergency-room care.
- Silver Mountain Resort in Kellogg recently began a \$500,000 project to upgrade the operating system of its famous gondola. The upgrade will be completed in time for the ski season, which normally starts around Thanksgiving weekend.

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# SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

## LABOR FORCE & EMPLOYMENT

The Seaport Area's August seasonally adjusted unemployment rate increased to 4.9 percent from July's rate of 4.6 percent, as shown in Seaport Table 1. In August 2002, the rate was 4.7 percent. Even though the unemployment rate increased slightly, total employment in August 2003 remained near July's totals, which is especially good news considering that employment in August usually decreases as agriculture and food processing wrap up the harvest season. Seaport's *Nonfarm Payroll Jobs* decreased by 220 from July 2003, but the real story is the loss of 1,140 jobs from August 2002. The year-over-year job decreases occurred in almost all industries with the largest decreases recorded in *Construction*, *Financial Activities*, and *Professional & Business Services*. In *Construction*, both industrial and residential construction jobs have decreased from last year as projects were completed. Idaho Department of Labor analysts will be tracking these employment decreases in *Financial Activities* and *Professional & Business Services* to see if they continue and to determine which specific sectors are affected. In spite of these decreases, several large projects will start in the coming months, such as the Nez Perce Tribe Clearwater Casino project near Lewiston and Interventional Pain Consultants clinic at the new Lewiston Business and Technology Park.

## SPECIAL TOPIC:

### Forest Certification

Forest certification stamps that appear on wood products are designed to tell consumers the wood used in the products has been grown and harvested in an environmentally friendly manner. For producers of wood products, like Potlatch Corp., the stamps might be the best way to tell consumers the company is using responsible business practices. This certification also could become a business necessity. Public and private forest owners are increasingly hiring in-

Seaport Table 1: Labor Force & Employment  
Nez Perce County, Idaho and Asotin County, Washington

	Aug 2003*	July 2003	Aug 2002	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	35,670	35,760	34,760	-0.3	2.6
Unemployment	1,760	1,630	1,630	8.0	8.0
% of Labor Force Unemployed	4.9	4.6	4.7		
Total Employment	33,910	34,140	33,130	-0.7	2.4
<b>Unadjusted</b>					
Civilian Labor Force	35,380	35,690	34,540	-0.9	2.4
Unemployment	1,490	1,470	1,370	1.4	8.8
% of Labor Force Unemployed	4.2	4.1	4.0		
Total Employment	33,890	34,220	33,170	-1.0	2.2
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	26,120	26,340	27,260	-0.8	-4.2
<b>Goods-Producing Industries</b>	4,370	4,540	4,760	-3.7	-8.2
Natural Resources & Mining	200	180	230	11.1	-13.0
Construction	1,000	990	1,200	1.0	-16.7
Manufacturing	3,170	3,370	3,330	-5.9	-4.8
Wood Product Manufacturing	550	550	610	0.0	-9.8
Food Manufacturing	90	270	110	-66.7	-18.2
Paper Manufacturing	1,220	1,220	1,260	0.0	-3.2
Other Manufacturing	1,310	1,330	1,350	-1.5	-3.0
<b>Service-Providing Industries</b>	21,750	21,800	22,500	-0.2	-3.3
Trade, Transportation & Utilities	5,610	5,570	5,480	0.7	2.4
Wholesale Trade	650	630	650	3.2	0.0
Retail Trade	3,660	3,630	3,530	0.8	3.7
Utilities	90	90	90	0.0	0.0
Transportation & Warehousing	1,210	1,220	1,210	-0.8	0.0
Information	370	360	360	2.8	2.8
Financial Activities	1,610	1,680	1,810	-4.2	-11.0
Professional & Business Services	1,380	1,380	1,590	0.0	-13.2
Education & Health Services	3,780	3,780	3,740	0.0	1.1
Leisure & Hospitality	2,600	2,570	2,730	1.2	-4.8
Other Services	1,160	1,160	1,140	0.0	1.8
Government Education	1,820	1,870	2,060	-2.7	-11.7
Government Administration	2,550	2,560	2,690	-0.4	-5.2
Government Tribes	870	870	900	0.0	-3.3

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

dependent auditors to inspect and certify their lands. These forest owners reason that it won't be long before such certification will be essential to sell their logs, lumber, or paper. Large home improvement retailers like Home Depot, Lowes, and Lanoga Corp., parent company of Lumbermen's Building Center stores, have all declared a preference for certified wood products. Some cities, corporations, and universities have adopted "green" building codes that demand certified wood products, and AOL Time Warner has said that 80 percent of the paper it uses will come from certified forests by 2006. Potlatch Corp., with 670,000 acres of forest land in North Central Idaho, and Bennett Forest Industries, with 12,000 acres, want access to these markets and have been certified or are

seeking certification. Acquiring the certification can take time, and a considerable amount of money and planning, while there are no guarantees a landowner who decides to undergo the process will be successful. So if a company such as Potlatch wants to be known as a good steward of the land, it will have to earn it by opening the company's operations to independent environmental auditors. Auditors for the Forest Stewardship Council evaluate landowners based on three broad categories: how well they manage their wood supply for long-term sustainability, how they treat the environment, and how they deal with neighboring communities and their employees. "As you might imagine, it's a balancing act," says Michael Thompson, an auditor for Scientific Certification Systems and a forestry consultant from Maine. "What we are looking for is how well they are balancing those three things."

## **AREA DEVELOPMENTS**

### **Clearwater County**

- Idaho's U.S. Senators Mike Crapo and Larry Craig are trying to land \$1 million for Orofino and Clearwater Counties to address economic losses caused by the annual drawdown of Dworshak Reservoir for fish migration purposes. The money was added to the U.S. Army Corps of Engineers' budget in September, along with language that directs the Corps to spend the money on projects to improve use of the reservoir and for economic mitigation for the Orofino community. The 55-mile-long reservoir on the North Fork of the Clearwater River is lowered 80 feet each summer to help cool the lower Snake River, and speed threatened and endangered salmon and steelhead to the ocean. According to a University of Idaho study, the drawdowns cause short-term losses of up to \$1.35 million in sales each year and the loss of 36 jobs.

### **Idaho and Lewis Counties**

- Syringa General Hospital (SGH) has acquired a helical computed tomography (CT) system from Toshiba Medical Systems. The \$500,000 machinery is designed to perform quicker exams and deliver optimal image quality. "We are really fortunate to have this type of equipment in a rural area such as Idaho County," said SGH radiology manager Dave Miller. The CT can make the detection of certain conditions, such as cancer and head and spine injuries, faster and easier by delivering clearer, more precise images of internal organs and the skeletal system. This up-to-date, state-of-the-art equipment allows more exams to be conducted in Grangeville rather than requiring a patient to go to Lewiston or elsewhere.

### **Latah County**

- Vacant business spaces on downtown streets and in malls around Moscow are being reoccupied. Zume, a pastry shop, and Emperor of India, a restaurant, are among some of the newer tenants in downtown Mos-

cow. Another new tenant who's received a lot of attention is New St. Andrews College, a private, conservative Christian school that owns one building, the former Verizon Building on the south side of Friendship Square. The college accepts only 40 to 50 students each year, with a total enrollment of about 200. The students bring \$2 million to the community each year, including tuition, and provide a boost to downtown businesses on a daily basis. Gritman Medical Center's expansion also will strengthen the downtown by bringing in more visitors. In addition two new stores and one eatery—Christopher & Banks, Big 5 Sporting Goods, and Sangria Grill and Bar—are opening soon at the Palouse Mall on the Moscow-Pullman Road, bringing the 416,000-square-foot shopping center's occupancy rate to 90 percent. Christopher & Banks is a Minneapolis-based chain that sells clothing targeted to working women between the ages of 35 and 55 who have families. Big 5 Sporting Goods, which opened a store in Lewiston in 2001, is constructing a 9,900-square-foot building at the Palouse Mall. Both stores plan to open in October. Sangria Grill and Bar will occupy a 3,300-square-foot building that once housed the Treaty Grounds, a brewpub. It's expected to serve its first meals at the end of October. The food will be inspired by traditional Peruvian cooking and will include seafood, meat, and vegetable entrees. Just like downtown Moscow and the Palouse Mall, space is becoming more scarce at East-side Market Place, which includes the addition of a Sears home appliance store that is projected to open in November.

### **Nez Perce County**

- Lewis-Clark State College (LCSC) broke ground in August on a 3,500-seat multipurpose activity center to replace the aging 1,400-seat Warrior Gymnasium. How to replace Warrior Gymnasium, which was built in 1937, has been under discussion for more than 30 years, but the project began in earnest in the early 1990s when then-President Lee Vickers began stumping for funding to get the project underway. Then in 1994 LCSC requested planning money from the State Board of Education for what was then expected to be a 4,000-seat gymnasium with a 1,200-seat auditorium/theater, swimming pool, racquetball courts, art studios and classrooms, and an estimated \$13 million price tag. Several years and many modifications later, LCSC students voted to raise \$1.5 million through fees, the community raised another \$1.5 million from 419 individual and corporate donors, and the state provided the rest of the funding for the now \$16.4 million, 100,000-square-foot center. But the project was put on the back burner sev-

*Continued on page 23*



# TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

## EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for August 2003 was 5.5 percent, as shown in Treasure Valley Table 1. This was one-tenth of a percentage point above the July 2003 rate of 5.4 percent and one-tenth of a percentage point above the August 2002 rate of 5.4 percent. Month-over-month, the number of employed persons decreased by 400, or 0.2 percent, from July 2003, and the number of unemployed individuals increased by 200 individuals, or 1.5 percent. The decreasing number of persons employed and the increasing number of persons unemployed created an overall decrease of 200 individuals, or 0.5 percent, in the *Civilian Labor Force*, from July 2003. Year-over-year, the number of employed persons decreased by 7,000, or 3.0 percent, and the number of unemployed individuals decreased by 100 individuals or 0.7 percent, creating a net decrease in the *Civilian Labor Force* of 7,100 individuals from August 2002. The *Civilian Labor Force* figures for August 2003 for

Treasure Valley Table 2: August 2003 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	174,664	8,476	4.9	166,188
Adams	1,846	288	15.6	1,558
Boise	2,633	197	7.5	2,437
Canyon	68,669	4,874	7.1	63,795
Elmore	9,823	652	6.6	9,172
Gem	6,104	465	7.6	5,638
Owyhee	4,153	90	2.2	4,063
Payette	9,505	1,200	12.6	8,305
Valley	3,985	334	8.4	3,651
Washington	4,244	637	15.0	3,607
Statewide	685,125	39,084	5.7	646,041

Treasure Valley Table 1: Boise MSA Labor Force & Employment  
Ada and Canyon Counties

	Aug 2003*	July 2003	Aug 2002	% Change Last Month	% Change Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	243,400	243,600	250,500	-0.1	-2.8
Unemployment	13,400	13,200	13,500	1.5	-0.7
% of Labor Force Unemployed	5.5	5.4	5.4		
Total Employment	230,000	230,400	237,000	-0.2	-3.0
<b>Unadjusted</b>					
Civilian Labor Force	244,700	247,500	253,000	-1.1	-3.3
Unemployment	12,400	12,900	12,400	-3.9	0.0
% of Labor Force Unemployed	5.1	5.2	4.9		
Total Employment	232,300	234,600	240,600	-1.0	-3.4
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	228,300	227,600	230,100	0.3	-0.8
<b>GOODS-PRODUCING INDUSTRIES</b>	46,300	46,000	48,600	0.7	-4.7
<b>Natural Resources &amp; Construction</b>					
<b>Manufacturing</b>	16,100	15,900	16,600	1.3	-3.0
Durable Goods	30,200	30,100	32,000	0.3	-5.6
Wood Product Manufacturing	23,100	23,000	25,000	0.4	-7.6
Fabricated Metal Products Mfg.	2,000	2,000	2,000	0.0	0.0
Machinery Manufacturing	1,500	1,400	1,500	7.1	0.0
Computer & Electronic Manufacturing	1,300	1,300	1,400	0.0	-7.1
Transportation Equipment Mfg.	14,500	14,400	16,300	0.7	-11.0
Other Durable Goods	1,600	1,600	1,700	0.0	-5.9
Nondurable Goods	2,200	2,300	2,100	-4.3	4.8
Food Manufacturing	7,100	7,100	7,000	0.0	1.4
Printing & Related Support Activities	5,200	5,200	5,200	0.0	0.0
Other Nondurable Goods	700	700	800	0.0	-12.5
<b>SERVICE-PROVIDING INDUSTRIES</b>	1,200	1,200	1,000	0.0	20.0
<b>Trade, Transportation, &amp; Utilities</b>	182,000	181,600	181,500	0.2	0.3
Trade	44,800	44,700	45,000	0.2	-0.4
Wholesale Trade	37,900	37,800	38,000	0.3	-0.3
Wholesalers, Durable Goods	10,600	10,600	10,400	0.0	1.9
Wholesalers, Nondurable Goods	6,600	6,600	6,500	0.0	1.5
Retail Trade	2,800	2,800	3,100	0.0	-9.7
Food & Beverage Stores	27,300	27,200	27,600	0.4	-1.1
General Merchandise Stores	4,100	4,100	4,200	0.0	-2.4
All Other Retail Trade	5,900	5,800	6,000	1.7	-1.7
Transportation, Warehousing, & Utilities	17,300	17,300	17,400	0.0	-0.6
Utilities	6,900	6,900	7,000	0.0	-1.4
Transportation & Warehousing	700	700	700	0.0	0.0
<b>Information</b>	6,200	6,200	6,300	0.0	-1.6
Telecommunications	3,600	3,600	3,600	0.0	0.0
<b>Financial Activities</b>	1,400	1,400	1,300	0.0	7.7
Finance & Insurance	12,200	12,200	12,100	0.0	0.8
Real Estate & Rental & Leasing	9,200	9,200	8,900	0.0	3.4
<b>Professional &amp; Business Services</b>	3,000	3,000	3,200	0.0	-6.3
Professional, Scientific, & Technical	33,400	32,700	32,500	2.1	2.8
Management of Companies & Ent.	9,400	9,400	10,200	0.0	-7.8
Administrative & Support & Waste Mgmt.	7,000	7,000	6,900	0.0	1.4
<b>Educational &amp; Health Services</b>	17,000	16,300	15,400	4.3	10.4
Educational Services	27,700	27,600	26,900	0.4	3.0
Health Care & Social Assistance	1,900	1,900	1,900	0.0	0.0
Hospitals	25,800	25,700	25,000	0.4	3.2
<b>Leisure &amp; Hospitality</b>	9,200	9,100	8,900	1.1	3.4
Arts, Entertainment, & Recreation	19,900	20,000	20,800	-0.5	-4.3
Accommodation & Food Services	2,800	2,900	3,000	-3.4	-6.7
Accommodation	17,100	17,100	17,800	0.0	-3.9
Food Services & Drinking Places	2,000	2,100	2,100	-4.8	-4.8
Other Services	15,100	15,000	15,700	0.7	-3.8
<b>Total Government</b>	6,700	6,700	6,800	0.0	-1.5
Federal Government	33,700	34,100	33,800	-1.2	-0.3
State & Local Government	5,600	5,500	5,500	1.8	1.8
State Government	28,100	28,600	28,300	-1.7	-0.7
State Government Education	12,900	12,800	12,500	0.8	3.2
State Government Administration	3,400	3,400	3,700	0.0	-8.1
Local Government	9,500	9,400	8,800	1.1	8.0
Local Government Education	15,200	15,800	15,800	-3.8	-3.8
Local Government Administration	8,300	8,600	8,900	-3.5	-6.7
	6,900	7,200	6,900	-4.2	0.0

\* Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

all ten counties in Southwest Idaho are shown in Treasure Valley Table 2 on page 11.

In the Boise City MSA *Nonfarm Payroll Jobs* increased by 700, or 0.3 percent, from July 2003 to August 2003, while over the year, *Nonfarm Payroll Jobs* lost 1,800 jobs in the Boise City MSA. Month-over-month, *Goods-Producing Industries* gained 300 jobs; job gains were noted in *Natural Resources, Mining, & Construction* (200 jobs), *Fabricated Metal Products Manufacturing* (100 jobs) and *Computer & Electronic Products Manufacturing* (100 jobs) while job decreases were noted in *Other Durable Goods Manufacturing* (-100 jobs). Year-over-year, *Goods-Producing Industries* lost 2,300 jobs. Losses occurred in *Natural Resources, Mining, & Construction* (-500 jobs), *Machinery Manufacturing* (-100 jobs), *Computer & Electronic Product Manufacturing* (-1,800 jobs), *Transportation Equipment Manufacturing* (-100 jobs), and *Printing and Related Supports Activities* (-100 jobs). Job gains occurred in *Other Durable Goods Manufacturing* (100 jobs) and *Other Nondurable Goods Manufacturing* (200).

In *Service-Providing Industries*, jobs gained outweighed jobs lost with 400 jobs gained in the Boise City MSA from July 2003 to August 2003. Job gains were experienced in *General Merchandise Stores* (100 jobs), *Administrative & Support & Waste Management Services* (700 jobs), *Health Care & Social Assistance Services* (100 jobs) including *Hospitals* (100 jobs), *Food Services & Drinking Places* (100 jobs), *Federal Government* (100 jobs), and *State Government Administration* (100 jobs). Job losses occurred in *Arts, Entertainment, & Recreation Services* (-100 jobs), *Accommodation Services* (-100 jobs), *Local Government Education* (-300 jobs), and *Local Government Administration* (-300 jobs). Year-over-year, *Service-Providing Industries* gained 500 jobs. Among those were gains were jobs in *Durable Goods Wholesale Trade* (100 jobs), *Telecommunications Services* (100 jobs), *Finance & Insurance Services* (300 jobs), *Management of Companies & Enterprises* (100 jobs), *Administrative & Support & Waste Management Services* (1,600 jobs), *Health Care & Social Assistance Services* (800 jobs), *Hospitals* (300 jobs), *Federal Government* (100 jobs), and *State Government Administration* (700 jobs). Job losses were noted in *Nondurable Goods Wholesale Trade* (-300 jobs), *Food and Beverage Stores* (-100 jobs), *General Merchandise Stores* (-100 jobs), *All Other Retail Trade* (-100 jobs), *Transportation & Warehousing Services* (-100 jobs), *Real Estate & Rental & Leasing Services* (-200 jobs), *Professional, Scientific, & Technical*

*Services* (-800 jobs), *Arts, Entertainment, & Recreation Services* (-200 jobs), *Accommodation Services* (-100 jobs), *Food Services & Drinking Places* (-600 jobs), *Other Services* (-100 jobs), *State Government Education* (-300 jobs), and *Local Government Education* (-600 jobs). The slow growth of jobs over the year is consistent with the downturn and slow recovery that the national economy has been experiencing since January 2001.

## AREA DEVELOPMENTS

### Boise City MSA

- The Hispanic Cultural Center of Idaho opened in Nampa on September 6. The 36,000-square-foot facility features several rooms to be used for lectures, classes, and training; a multipurpose community room that can accommodate up to 350 people; culinary classrooms; a computer lab; a gift shop; a gallery that will house artwork by local, national, and international artists; rooms where English and Spanish financial classes will be offered by Home Federal; and a library. At the grand-opening celebration, Dana Gioia, the National Endowment for the Arts chairman, spoke to supporters and the public who gathered to celebrate the opening.
- Treasure Valley Community College (TVCC) held a grand opening celebration for its satellite campus in the Idaho Migrant Council's (IMC) El Mercado Building in Caldwell in early September. The TVCC Caldwell Center will be an educational resource that will serve community needs of Canyon County and surrounding counties. More than 70 classes are taught in the facility, which includes five classrooms.
- The Boise River Festival organizers announced that they would file for Chapter 7 bankruptcy protection and liquidate all assets. Operations ceased immediately following the announcement, meaning that the 13-year festival had ended. The Boise River Festival had reached a debt of \$500,000 and is selling its assets to raise money to pay the debt. The festival will not be held in 2004, although popular events like the balloon rally, fireworks show, and block party concerts may continue in other forms.
- Qwest announced that it was expanding in early September. The company announced that it would add 150 jobs to its Boise DSL technical support center; Qwest currently employs 300 at

the Boise facility. The DSL technical support center offers 24-hour seven-day-a-week technical support for customers with DSL service. DSL is a broadband high-speed technology used by individuals and businesses primarily for accessing the Internet.

- Micron Technology sold 33.9 million shares of stock (5.3 percent of common stock) to Intel. The \$450 million deal indicates Intel and Micron have a strong corporate relationship; the two companies have plans for joint development and deployment of new products in the future.
- J. R. Simplot closed its meat processing plant in Nampa and laid off 272 people on September 19. Company officials blame beef industry economics for the closure citing lack of profitability as its chief reason for shutting the doors. Before closing, the company tried to sell the plant and preserve jobs, but no buyer was found. The company previously laid off 87 employees when it closed a potato processing line at a plant in Canyon County earlier this year; the two layoffs leave nearly 360 people unemployed.
- The Idaho Athletic Club continues construction on its 29,000-square-foot building located at the corner of Overland Road and Maple Grove in southwest Boise. The new club will feature a half-court basketball facility, an indoor pool, an aerobics room, an exercise equipment room, and offices. The facility is expected to open in February 2004. This will be the fourth Idaho Athletic Club facility in the Treasure Valley.
- Bella Fina, a furniture and home accessories store, held a grand opening in late September in Meridian. The 14,000-square-foot store is located on Sonata Lane near Lee Read Jewelers and can be seen from I-84. The store sells boutique-style furniture, hand-loomed rugs, purses, belts, leather goods, wall coverings, artwork, jewelry, and linens.
- Hampton Inn & Suites opened a new hotel near the Idaho Center in Nampa in mid-September. The four-story facility has 101 rooms and 4,000-square feet of conference space. The hotel plans to hold a grand opening celebration in mid-October.
- Procter & Gamble announced plans to open a Boise sales office this fall. The sales office will be located near Albertsons headquarters in the River Quarry office complex in Boise and is part of Procter & Gamble's North American Market Development Organization. The Boise office will employ about 12 people.
- Sunset Sports, located on the corner of Curtis and Fairview in Boise, closed in late September. The owners started liquidating the merchandise in late August.
- Ashley Manor Care Center held a grand opening for its fourth and newest facility in Canyon County in mid-September. The new facility is located at 2604 Iowa Street in Caldwell. The company specializes in the care of patients with Alzheimer's and other forms of dementia. The new center can accommodate seven patients.
- In other recent business happenings in the Boise City MSA: Farmers and Merchants State Bank broke ground and started construction of their newest branch on 12<sup>th</sup> Avenue in Nampa; construction started on a Maverik convenience store at the southeast corner of 10<sup>th</sup> Avenue and Ustick Road in Caldwell; construction began on a Pizza Hut that will anchor the Cherry Crossing office development, located at the northwest corner of Cherry Lane and Linder Road in Meridian; construction started on a Fred Astaire Dance Studio that will be located in the SilverStone Corporate Center on Eagle Road, south of Overland Road in Meridian; a 10,800-square-foot Reebok outlet store opened in the Boise Factory Outlet Mall in southwest Boise; a Wonder/Hostess Bakery Outlet opened in The Shops, located at State and Bloom Streets in Boise; Moffett Photography reopened in downtown Nampa after a remodel. In addition, Primary Health announced plans to open an office on Emerald Street in Boise in early 2004, Liberty Northwest announced that it plans to move its operations from its current location on Park-Center Boulevard to a space on Chinden Boulevard west of Cloverdale in Boise, Great West Casualty Co. announced plans to move its operations from its current location on Emerald Street in Boise to a new facility in the El Dorado commercial complex in Meridian, West Coast Paper announced plans to move its operations

from its current location on River Street to a more spacious warehouse on Federal Way in southeast Boise.

#### **Adams County**

- A new Subway restaurant was recently opened at the corner of U.S. 95 and Idaho 55 in New Meadows. Susan and Dave Kellogg opened the restaurant and own several other businesses at the U.S. 95 and Idaho 55 crossroads.

#### **Elmore County**

- Mountain Home held its annual Air Force Appreciation Day celebration in September. This year, nearly 85,000 spectators attended the celebration that included a fun run, dance, parade, and entertainment. More than 50,000 people were viewing the USAF Thunderbirds air show demonstration when an F-16C crashed into the ground. The pilot safely ejected from his seat just seconds before the crash; he was treated at the hospital for minor injuries and released.

#### **Gem County**

- Walter Knox Memorial Hospital recently started an expansion project. Some of the construction will be on the main entrance, so a temporary entrance is located at the east side emergency doors. Once the remodeling/expansion project is completed, the lab and radiology departments will be larger, the post-surgery and recovery rooms will be remodeled, the dietary area will be smaller, and a business office and medical records area will be added. The remodeling/expansion project is scheduled for completion by July 2004.

#### **Payette County**

- Nick Grace and Brian Jackson opened Lucky 2 Boot, Tack, and Shoe Repair in Payette. The business repairs shoes, boots, tack, tents, saddles, chaps, and more.
- Snake River Veterinary Center opened in its new location on U.S. Highway 95 in Fruitland in late August. Snake River Veterinary Center, once known as Ashton Veterinary Center and Ashton-Clark Veterinary Center, was located at 1844 Seventh Avenue North in Payette for more than 50 years. The new facility is large enough to house everything for the clinic, and there is extra land to construct a barn on the property for large animal care.

#### **Valley County**

- The Ashley Inn of Cascade held its grand opening in mid-September. The 67-room inn boasts a number of amenities, including a swimming pool, spa, exercise facility, massage, conference area, and a continental breakfast. Ashley Inn employs 30 full- and part-time employees.
- Tamarack Resort started utilities work on its property near Donnelly, by awarding contracts to several companies. Warrington Construction was awarded a \$2 million contract to build 5.3 miles of sewer line from Donnelly to Tamarack Resort, and to upgrade the North Lake Water & Sewer District treatment facility. Masco Construction was awarded a \$640,000 contract to install about 2.1 miles of collection sewer line within the resort. Idaho Power started a \$2.6 million line upgrade from Donnelly to the resort. Frontier Communications was awarded a contract for the installation of underground telephone within the resort. Charter Communication was awarded a contract to install and operate the cable TV system at the resort. This winter, the public will be able to use 22 kilometers of Nordic skating lanes and guided snowcat skiing. When completed, Tamarack Resort will be a \$1.5 billion four-season resort.

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# MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

## EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Magic Valley Labor Market Area for August 2003 was 3.8 percent as seen on Magic Valley Table 1. This was one-tenth of a percentage point lower than July 2003, but five-tenths of a percentage point higher than August 2002. This year-over-year increase was due to the Magic Valley economy stabilizing after an infusion of 500 or more jobs by Dell Computer Company and the loss of close to one hundred jobs from Moore North American's closure of its Jerome facility. However, the combined rate of 3.8 percent for the Magic Valley LMA is indicative of job growth and a still robust economy.

*Nonfarm Payroll Jobs* showed continued excellent growth in August 2003. The entire category increased by 2,450 jobs. Given the rest of the state's job losses, the job growth in the Magic Valley LMA is counter to most of the nationwide and statewide recessionary tendencies. Employment sectors that showed double-digit job growth were *Construction*, *Transportation*, and *Educational & Health Services* with increases of 25.1, 10.3, and 21.5 percent, respectively. The construction growth appears to be tied mostly to new housing starts and some larger industrial construction. Due to low interest rates and a strong local economy, the city of Twin Falls has had a record pace in new housing permits, shattering a record in 2002 and on a record-shattering pace in 2003. New store construction on the canyon rim has also contributed a great deal with a new Best Buy and a new Sportsmen's Warehouse that just opened. *Retail* showed a modest increase of 4.5 percent.

## CORRECTION

In the last edition of the *Idaho Employment* newsletter, it was erroneously reported that a groundbreaking ceremony for St. Benedicts Family Medical Center would be held in Gooding. In fact, the groundbreaking ceremony will take place at the Crossroads area close to Interstate 84 in Jerome. The Regional Labor Economist apologizes to St. Benedicts and any others who may have been misled and regrets the error.

Magic Valley Table 1: Labor Force & Employment  
Twin Falls, Jerome, and Gooding Counties

	Aug 2003*	July 2003	Aug 2002	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	54,050	54,780	49,880	-1.3	8.4
Unemployment	2,050	2,160	1,710	-5.1	19.9
% of Labor Force Unemployed	3.8	3.9	3.4		
Total Employment	52,000	52,620	48,170	-1.2	8.0
<b>Unadjusted</b>					
Civilian Labor Force	55,420	55,360	51,560	0.1	7.5
Unemployment	2,150	1,990	1,880	8.0	14.4
% of Labor Force Unemployed	3.9	3.6	3.6		
Total Employment	53,270	53,370	49,680	-0.2	7.2
<b>JOB BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	43,080	42,730	40,630	0.8	6.0
<b>Goods-Providing Industries</b>	8,920	8,020	7,880	11.2	13.2
Natural Resources & Mining	20	20	30	0.0	-33.3
Construction	2,790	2,370	2,230	17.7	25.1
Manufacturing	6,110	5,630	5,610	8.5	8.9
Food Manufacturing	4,000	3,550	3,680	12.7	8.7
Other Manufacturing	2,110	2,080	1,930	1.4	9.3
<b>Service-Providing Industries</b>	34,170	34,710	32,750	-1.6	4.3
Trade, Transportation & Utilities	10,200	10,140	9,830	0.6	3.8
Wholesale Trade	1,770	1,820	1,850	-2.7	-4.3
Retail Trade	6,090	6,020	5,830	1.2	4.5
Utilities	200	160	210	25.0	-4.8
Transportation & Warehousing	2,140	2,150	1,940	-0.5	10.3
Information	500	500	500	0.0	0.0
Financial Activities	1,760	1,770	1,680	-0.6	4.8
Professional & Business Services	5,300	6,110	5,370	-13.3	-1.3
Educational & Health Services	3,730	3,850	3,070	-3.1	21.5
Leisure & Hospitality	3,940	3,600	3,660	9.4	7.7
Other Services	1,500	1,520	1,490	-1.3	0.7
Government Education	3,230	3,090	3,030	4.5	6.6
Government Administration	4,000	4,120	4,130	-2.9	-3.1

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

This is notable because *Retail* had been somewhat flat and, in some cases, has shown small decreases over some of the past months. The trend has turned around in just the last six months or so. It may be interesting to see if the growth trend continues through the holidays and into the normal post holiday reductions in force.

The sectors that showed decreases were *Natural Resources & Mining*, *Wholesale Trade*, *Utilities*, and *Professional & Business Services* with losses of 33.3, 4.3, 4.8, and 1.3 percent, respectively. The extremely large loss in *Natural Resources & Mining* is due to streamlining of personnel in rock extracting and rock crushing. Except for that larger percentage decrease, the other drops were relatively minor.

In summary, the economy of the Magic Valley LMA appears to be the best performer proportionally in the entire state, especially in the area of new job creation. With unemployment less than 4.0 percent, it also is a strong per-



former statewide. The Magic Valley economy has diversified remarkably in the last three years, and even business closures and job loss adjustments have not made a huge statistical impact. It should be interesting to see how long low interest sustains housing growth and whether stable economic growth will continue to influence market-driven retailers to locate in the area and create new jobs.

#### **SPECIAL TOPIC:**

##### **Agricultural Recap and Forecast**

Agriculture in 2003 has been a mixed bag of economic signals. Even though the 2002-2003 water year was slightly below normal, the irrigation availability has been adequate for most crops. The weather was cool in the spring, but July set records for heat. This extreme heat caused a huge demand on existing water supplies, leaving the Snake River at record low flow levels and all reservoirs virtually empty. The long years of drought have made soil moisture and groundwater availability a cause for deep concern, and this year's heat has exacerbated the situation. This winter's water season needs to be at least normal; far above normal would be better as much of the snow that will melt next spring will be absorbed more readily because the soil in the mountain areas is so dry.

The quality of the crops was very good this year. In fact, the popular maxim was if water could be maintained on the crops, they would turn out well. There was some early concern about H-2A worker availability due to the war in Iraq in March and April. The war heightened terrorism concerns, and border checks on prospective workers were more thorough and time-consuming; consequently, some early H-2A availability dates were missed. *(The H-2A temporary agricultural program establishes a means for agricultural employers who anticipate a shortage of domestic workers to bring nonimmigrant foreign workers to the U.S. to perform agricultural labor or services of a temporary or seasonal nature.)* However, hiring in agriculture was average this year. The extreme heat in July hastened the development of most crops and most harvests were early. The exception to the quality rule was in some sugar beet crops where size and sugar content was suspect as the intense heat may have caused the plants to mature too rapidly. Grain crops and even potatoes enjoyed an early harvest. The drawback was that some seasonal workers were displaced two to four weeks earlier than normal.

Commodity prices were fairly average for all commodities except potatoes and milk. Those commodities suffered some of the lowest prices they have had in decades. Potato prices were coming off an unusually strong price year on open market potatoes in 2002. The market adjusted strongly downward in 2003 as large surpluses were reported and demand for French fry products reached a 15-year low. The closure of the Simplot plant in Heyburn, as well as indefinite layoffs for 250 McCain Foods USA workers, has underlined farmers' potato contract concerns. Milk prices have seen a slump that has lasted about two years. Post September 11, 2001, changes in consumer behavior that kept a lot of people out of restaurants contributed to

the decline. Recent strong health warnings about child obesity and cholesterol levels affected both French fry and milk products demand and has kept home usage flat. Also suffering somewhat is the trout market. Trout products and/or seafood are considered luxury products by many consumers and are generally purchased with discretionary income. Recessionary times are generally very detrimental to these products, although fish products are considered healthy food sources. Sales of other meat and poultry products seemed to be average in 2003.

The South Central Idaho outlook for agriculture in 2003 is more guarded than it has been in recent years. All forecasts and speculations are always predicated on adequate water in the area. If adequate irrigation water is not obtained in the 2003-2004 water season, there will be serious, if not catastrophic, consequences for many farmers. Some will have to make hard decisions concerning crop mix and duration, and long-duration crops might be difficult, if not impossible, to plant because there will be no assurance that there will be enough water to ensure that the crop will be able to mature into a harvestable commodity. Outlying counties that have already had drought emergencies will only see these situations intensify. Potato demand and contracts are a serious concern. Already Idaho potato organizations have asked for voluntary supply cutbacks from farmers, and this will only be more serious if supply and demand remain as they are. The closure of potato processing plants and layoffs in that industry cannot fail to have a detrimental effect on potato contracts. It is a great unknown as to how many contracts will be issued in South Central Idaho, and how terms and conditions may be changed or modified. General commodities, such as grains, corn, and dry beans, are expected to have an average year. Beef, poultry, pork, and lamb prices should remain flat in 2004, but could rise if the national and world economy improves. Trout prices will show improvement if the economy improves, or if other types of marketing or uses are discovered. Dairy outlook for next year is a little better than 2003. Some futures prices are nudging upward, and there are possible uses for milk and milk products in reconstruction and relief efforts in Iraq and Afghanistan. The number of dairies in South Central Idaho is expected to decrease slightly, but production and cattle numbers should remain stable. Any major dairy growth is not foreseen unless it occurs in the Mini-Cassia area.

In summary, given a larger number of unknowns than usual, the outlook for agriculture is too difficult to forecast with any degree of comfort and therefore the term "guarded" must suffice. As with everything in the South Central region, if irrigation capacity is good, the outlook will improve dramatically. The farmers of this region are some of the best in the nation and are resilient. They have endured many different business cycles and climates, and they should continue to endure and prosper.

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# SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

## EMPLOYMENT TRENDS

In August 2003, the Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate increased three-tenths of a percentage point to 5.5 percent. The August rate remained lower than one year earlier when it was 6.2 percent, a trend that has continued throughout 2003. The MSA's unemployment rate in August 2003 was two-tenths of a percentage point lower than the state unemployment rate of 5.7 percent and six-tenths of a percentage point lower than the U.S. unemployment rate of 6.1 percent.

*Nonfarm Payroll Jobs* increased five-tenths of a percentage point in August from July, a gain of 170 jobs. Most job gains were typical for this time of year and occurred in *Professional & Business Services* (150) and *Leisure & Hospitality* (170). *Professional & Business Services* include call centers and temporary staffing agencies. The increased jobs in this category reflect additional hiring at Convergys Customer Support Center in Pocatello and temporary summer jobs in *Agriculture, Manufacturing, and Retail Trade*. Year-over-year, *Nonfarm Payroll Jobs* increased 2.1 percent, a gain of 670 jobs. The *Goods-Producing Industries* suffered a loss of 40 jobs. While *Construction* gained 70 jobs, *Manufacturing* lost 110 jobs. The *Manufacturing* job losses occurred because of downsizing at Ballard-Kimberly Clark and SME Steel Contractors, the result of a slow national economy and the trend to move manufacturing jobs out of the United States to take advantage of inexpensive labor in other countries.

## SPECIAL TOPIC:

### Mid-year construction

Despite a slow and jobless economic recovery, low interest rates energized the construction industry. In Southeast Idaho, construction in the first half of 2003 exceeded the first half of 2002 by 46 percent, an increase of more than \$14.5 million. Increased construction activity

Southeast Idaho Table 1: Labor Force & Employment  
Pocatello City MSA (Bannock County)

	Aug 2003*	July 2003	Aug 2002	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	39,930	40,560	39,040	-1.6	2.3
Unemployment	2,200	2,100	2,420	4.8	-9.1
% of Labor Force Unemployed	5.5	5.2	6.2		
Total Employment	37,730	38,460	36,620	-1.9	3.0
<b>Unadjusted</b>					
Civilian Labor Force	39,230	39,330	38,450	-0.3	2.0
Unemployment	2,110	1,940	2,330	8.8	-9.4
% of Labor Force Unemployed	5.4	4.9	6.1		
Total Employment	37,120	37,390	36,120	-0.7	2.8
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	32,340	32,170	31,670	0.5	2.1
<b>Goods-Producing Industries</b>	4,360	4,380	4,400	-0.5	-0.9
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,820	1,820	1,750	0.0	4.0
Manufacturing	2,530	2,550	2,640	-0.8	-4.2
Food Manufacturing	450	470	460	-4.3	-2.2
Fabricated Metal Product Manufacturing	110	110	120	0.0	-8.3
Machinery Manufacturing	30	30	40	0.0	-25.0
Other Manufacturing	1,940	1,940	2,020	0.0	-4.0
<b>Service-Providing Industries</b>	27,980	27,790	27,270	0.7	2.6
Trade, Transportation & Utilities	6,640	6,650	6,660	-0.2	-0.3
Wholesale Trade	990	980	1,050	1.0	-5.7
Retail Trade	4,380	4,410	4,350	-0.7	0.7
Utilities	50	50	50	0.0	0.0
Transportation & Warehousing	1,220	1,210	1,210	0.8	0.8
Information	690	690	690	0.0	0.0
Financial Activities	1,760	1,780	1,800	-1.1	-2.2
Professional & Business Services	3,570	3,420	3,220	4.4	10.9
Educational & Health Services	2,820	2,840	3,070	-0.7	-8.1
Leisure & Hospitality	3,340	3,170	3,280	5.4	1.8
Other Services	1,290	1,290	1,210	0.0	6.6
Government Education	3,720	3,790	3,570	-1.8	4.2
Government Administration	4,160	4,150	3,780	0.2	10.1

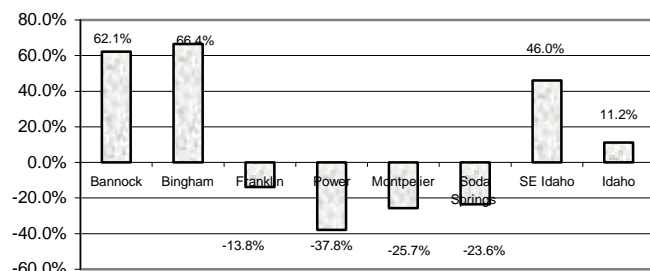
\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

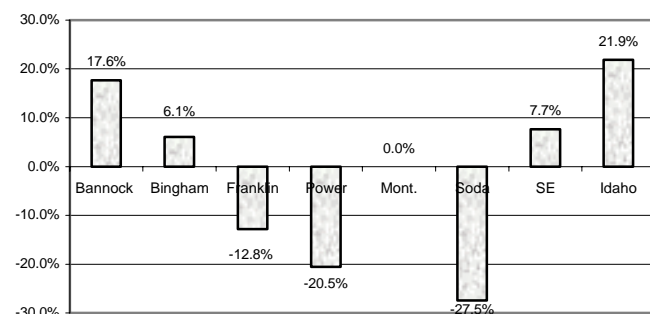
was limited to Bannock and Bingham Counties, as illustrated in **Chart 1: Change in Total Construction** on page 18, and the area's most rural counties suffered decreased construction activity. The large increase in construction activity was driven mainly by nonresidential construction, which increased over 200 percent compared to nearly 8.0 percent in residential construction. **Chart 2: Change in Residential Construction** and **Chart 3: Change in Nonresidential Construction** on page 18 show that Bannock and Bingham Counties drove increased area construction. During the first half of 2003, rural counties were unable to take advantage of record-low interest rates to boost their economies.

The change in Southeast Idaho's construction activity during the first half of 2003 over the first half of 2002 (46 percent) outpaced the change in

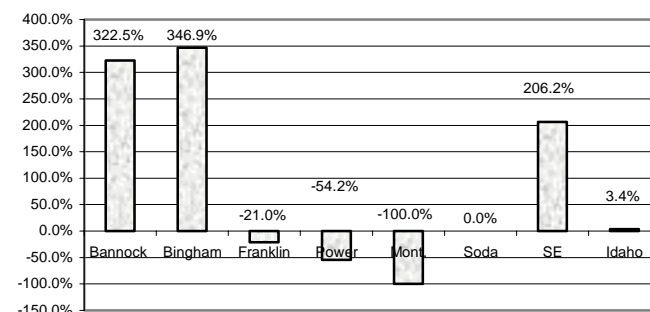
Southeast Idaho Chart 1: Change in Total Construction  
2002-2003 Percentage Change



Southeast Idaho Chart 2: Change in Residential Construction



Southeast Idaho Chart 3: Change in Nonresidential Construction



construction statewide (11.2 percent). The state's increased residential construction activity (21.9 percent) outpaced Southeast Idaho's 7.7 percent by a wide margin. But the big difference occurred in increased nonresidential construction in Southeast Idaho (206 percent) compared to the statewide increase (3.4 percent).

## AREA ECONOMIC DEVELOPMENTS

*Please note: Information contained in this section is obtained from area newspapers, local Job Service offices, trade publications, local area Chambers of Commerce publications, and other sources.*

- Installation of approximately 91 miles of a new natural gas pipeline throughout Southeast Idaho began in September. The project, which includes five miles through Pocatello and 11 miles through Soda Springs, brought approximately 90 jobs to the area.

Construction disrupted golf at three courses, two in Pocatello and one in Soda Springs, and included some residential areas. The new pipeline will increase the flow of natural gas to the Northwest United States.

### Bannock County

- AMI Semiconductor, headquartered in Pocatello, offered shares of the company to the public in an introductory public offering. The offering, listed with NASDAQ, is expected to raise approximately \$500 million in new capital and will put the company as well as Pocatello in the national spotlight. Shares have sold between \$18 and \$22 each since the offering began.
- Hullabaloo Music Machine and Karaoke opened in Pocatello. The new business provides a wide variety of music with a state-of-the-art sound system for special events such as weddings, dances, reunions, and fundraisers.

### Bear Lake County

- In the city of Montpelier, local businesses are taking advantage of local history to boost tourism. A \$1 million revitalization project, aimed at making downtown Montpelier more attractive to tourists, included new sidewalks, trees, streetlights, and a cobblestone median. The project was funded by the formation of a Business Improvement District and matching grant money. A "Bears Everywhere" theme was adopted by businesses in the community and bears of all types are being placed outside businesses. Approximately 700,000 people travel through Montpelier annually, and the business community hopes to lure some of those travelers into the city.

### Bingham County

- Record crowds attended the 101<sup>st</sup> Eastern Idaho State Fair in Blackfoot in September. Fair organizers estimated this year's attendance exceeded last year's attendance of 203,000. The fair boosts employment by more than 100 workers for the week of the fair.
- Bingham Memorial Hospital opened a new spine center in August. The \$1 million state-of-the-art center includes a spine operating room with the newest technology and equipment.
- A new business park in Firth has attracted three businesses. The 10,000-square-foot business park was developed by a partnership between private industry, the State of Idaho, and the City of Firth. The state provided a \$500,000 infrastructure upgrade, the city paved the main street and parking area, and Killpack Enterprises invested \$1 million in the business park. Three businesses—a medical

*Continued on page 23*



# NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

## EMPLOYMENT TRENDS

August's seasonally adjusted unemployment rate for the Bonneville Labor Market Area (LMA) decreased three-tenths of a percentage point over the month to 3.5 percent as seen in Northeast Table 1. That rate is the same as in August 2002. The LMA's rate is 2.2 percentage points lower than the state's rate of 5.7 percent and 2.6 percentage points lower than the national rate of 6.1 percent. The unemployment rate for all four counties in the LMA decreased over the month as construction remained strong, preparation for harvest began, and the labor force decreased by over 2,300 people; the number of unemployed people decreased by over 300. Year-over-year, the labor force decreased by over 2,100 while unemployment decreased by only 40. Idaho Falls, the largest city in the LMA, showed a decrease in the unemployment rate of one-tenth of a percentage point over the month and two-tenths of a percentage point over the year.

*Nonfarm Payroll Jobs* in the LMA decreased 1,080 jobs from July. *Government Education* saw a decrease of 800 jobs while summer terms ended with breaks until the beginning of the fall term. *Wholesale Trade* lost 140 jobs while some fresh-pack and processing plants reduced their workforces to skeleton crews for maintenance during the slow season before new crops arrive. Even *Manufacturing* decreased by more than 100 jobs due to a large decrease in its *Food Manufacturing* sector, stemming from the same reason for the dip in *Wholesale Trade*. There were gains over the month, such as 200 jobs in *Construction* with days staying clear and sunny for optimal building. *Leisure & Hospitality* increased by 40 jobs and *Other Services* added 60 jobs.

Year-over-year, *Nonfarm Payroll Jobs* increased by only 100, though individual industries saw some larger changes.

Northeast Idaho Table 1: Labor Force & Employment  
Bonneville, Bingham, Butte, and Jefferson Counties

	Aug 2003*	July 2003	Aug 2002	% Change From Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	80,470	82,820	82,660	-2.8	-2.6
Unemployment	2,840	3,190	2,880	-11.0	-1.4
% of Labor Force Unemployed	3.5%	3.8%	3.5%		
Total Employment	77,630	79,640	79,780	-2.5	-2.7
<b>Unadjusted</b>					
Civilian Labor Force	83,010	84,580	83,750	-1.9	-0.9
Unemployment	3,560	2,750	3,680	29.5	-3.3
% of Labor Force Unemployed	4.3%	3.3%	4.4%		
Total Employment	79,450	81,830	80,070	-2.9	-0.8
<b>JOB BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	63,710	64,790	63,610	-1.7	0.2
<b>Goods-Producing Industries</b>	11,360	11,270	10,390	0.8	9.3
Natural Resources & Mining	70	70	80	0.0	-12.5
Construction	5,970	5,770	5,200	3.5	14.8
Manufacturing	5,320	5,430	5,110	-2.0	4.1
Food Manufacturing	2,410	2,560	2,700	-5.9	-10.7
Fabricated Metal Product Manufacturing	320	300	280	6.7	14.3
Machinery Manufacturing	490	500	430	-2.0	14.0
Other Manufacturing	2,100	2,070	1,700	1.4	23.5
<b>Service-Providing Industries</b>	52,350	53,520	53,220	-2.2	-1.6
Trade, Transportation & Utilities	14,180	14,370	14,410	-1.3	-1.6
Wholesale Trade	4,700	4,840	4,700	-2.9	0.0
Retail Trade	7,540	7,580	7,890	-0.5	-4.4
Utilities	110	110	110	0.0	0.0
Transportation	1,830	1,840	1,710	-0.5	7.0
Information	770	820	910	-6.1	-15.4
Financial Activities	2,040	2,050	2,100	-0.5	-2.9
Professional & Business Services	11,790	11,900	11,860	-0.9	-0.6
Educational & Health Services	6,430	6,460	6,100	-0.5	5.4
Leisure & Hospitality	5,340	5,300	5,310	0.8	0.6
Other Services	2,310	2,250	2,450	2.7	-5.7
Government Education	3,260	4,060	3,970	-19.7	-17.9
Government Administration	6,230	6,310	6,110	-1.3	2.0

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

*Construction* was up 770 jobs from August 2002, with large commercial projects such as Taylor Crossing on the River, a commercial strip center, and the Grupo Modelo malt processing plant still in the works. Residential construction is still very strong in all counties except Butte. *Manufacturing* gained 210 jobs in spite of a decrease of 290 jobs since August 2002 in its *Food Manufacturing* sector. *Educational & Health Services* increased by 330 jobs (mostly *Health Services*) while *Transportation* and *Government Administration* each increased by 120 jobs. Larger losses were noted in *Government Education* (-710 jobs) from budget cuts and population changes, *Retail Trade* (-350 jobs) and *Information* (-140 jobs) stemming from the national economy's lower level of consumer confidence.

## **SPECIAL TOPIC:**

### **Building Eastern Idaho**

A review of the past year shows that construction totals have been hitting record levels for quite some time. Logically, by looking at other numbers such as the steady increases in *Civilian Labor Force* and population, it can be seen that growth is steadily plodding along in the LMA, regardless of national woes. In the *Idaho Construction Report* published by Wells Fargo Bank, total construction value was up almost \$5 million in June 2003 compared to June 2002 for Eastern Idaho, which encompasses Bingham, Bonneville, Madison, Jefferson, Fremont, and Lemhi Counties. A six-month cumulative report shows that total construction value increased \$13 million compared to the first half of 2002. Most of the growth was noted in new residential dwelling units for a total value of \$75,196,710. Rexburg shows the largest growth in new dwelling units, up to 353 units for the first six months of 2003 compared to 126 in the same time period in 2002. As BYU-Idaho steadily grows with record-breaking enrollments, it is no surprise. While 28 of the increased number of units are single dwelling units, 199 are multi-family dwellings—mostly for married student housing. Idaho Falls dropped by 60 units (all in multi-family units) over the six-month time frame, while Ammon increased by 40 units, mostly in single-family units. The extremely mild winter that Idaho experienced made it possible to work year-round in nearly every phase of construction.

## **AREA DEVELOPMENTS**

### **Bonneville County**

- Kenny Rogers Roasters closed its doors at Seventeenth Street in Idaho Falls at the end of August after holding on longer than most of the other Roasters throughout the nation. Financial troubles plagued the chain since Roasters opened in Idaho Falls, but due to the support of the community, the Idaho Falls location was able to stay open until now. The Seventeenth Street restaurant space is currently up for lease.
- Lettuce Eat opened its second Idaho Falls restaurant downtown in the Bonneville Hotel on Park Avenue and Constitution Way. The restaurant is unique for featuring a 60-plus item salad bar. It also features a hot bar with a selection of soups, chicken wings, and baked potatoes, along with an offering of breads and desserts. The downtown location is open from 9:00 a.m. to 4:35 p.m. Monday through Friday.
- Sonic Drive-In is set to open in mid-November at the corner of Pancheri Drive (across from Seven-

teenth Street) and South Yellowstone in Idaho Falls. This will be the second location in the area; the first restaurant is in Ammon on Seventeenth Street. The fast food establishment will feature its Accent on Education by providing incentives for elementary-age children. Along with other promotions, the "Wacky-Pak" kids' meal will feature educational CD-ROMs that focus on science, language, and geography.

- Wal-Mart announced plans to open another superstore in the area between Utah Avenue and Broadway (off Houston Street) in Idaho Falls. Though it just built a superstore in Ammon, near Idaho Falls, the company feels confident the community can support another store due to the large retail area it serves. The new superstore will be 200,000-square feet and will include three restaurant pads. Wal-Mart officials anticipate opening the new superstore in the spring of 2005.

### **Custer County**

- The Challis Assisted Living Facility had an open house the first part of October with tours and an official dedication. The company functions under its corporate charter, Custer Health Care Association, and is a non-profit entity. Work on the facility started four years ago.

### **Lemhi County**

- East Idaho Credit Union broke ground on a new branch at 777 North Lillian Street in Salmon, across the street from its existing branch. The 3,700-square-foot facility is scheduled for completion in May 2004, and will include a drive-up window and ATM machine. The existing operation will vacate the current location and move into the new building at that time. The Credit Union has been in Salmon for 22 years.

### **Teton County**

- Hernandez Mexican Restaurant reopened in early September after closing seven months ago when a fire destroyed several businesses in the shopping strip where they were located. The new location at 355 North Main Street in Driggs is smaller than the original restaurant, but offers an open deck in the summer. The menu was expanded to include American-style breakfasts.

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## SNAPSHOT OF BENEFITS PAID IN IDAHO'S UNEMPLOYMENT INSURANCE PROGRAM

September 30 each year marks the end of the federal fiscal year—the 12-month budget and accounting period—that pertains to most federal agencies and programs. The federal fiscal year is also an important period for Idaho's Unemployment Insurance (UI) program as the state's basic UI administrative system must coincide with the federal program. This is also an opportune time to summarize some aspects of UI benefit payments made during this period.

The Federal-State Unemployment Compensation (or Insurance) Program was established as Title III of the Social Security Act of 1935 as a means to pay a monetary sum or benefit to unemployed workers. Title IX of the act established a tax on employers to finance the UI program and established a trust fund in which the taxes paid through a federal-state cooperative program would be held for benefit payments. Not every unemployed person was eligible for benefits nor every employer taxed, but the basic notion of paying some money to help a productive worker through a period of involuntary unemployment still exists.

Besides providing some financial assistance to unemployed workers, there are several other positive attributes usually associated with UI payments. The money paid to the unemployed person probably is quickly spent, thereby contributing to the local community's economic stability. Idaho has many small communities with relative high percentages of UI claimants along with persistently high unemployment rates. The flow of funds into these towns is very helpful. Additionally, the usual requirement that the claimant be available for and seeking work maintains an attachment to the local labor force, or maintains a labor pool available to meet the local demand for labor.

Labor market analysts use UI claims data to provide additional information about local economic conditions and trends. UI claims information compiled by industry can be used to validate trends spotted in the *Nonfarm Payroll Jobs* data. Claims data is a major component of the model used to estimate unemployment rates in specific areas. Many initial claims submitted in the same time period can signal a mass layoff or plant closure. In addition, economic developers often use claimant numbers and characteristics to estimate an available labor supply.

There were two primary UI programs administered in Idaho during FY03. The regular UI program paid out

\$187,628,605 during FY03. This includes residents of other states filing a claim against an Idaho employer. A second program, *Temporary Extended Unemployment Compensation* (TEUC) was initiated by Congress in March 2001. It has been renewed twice by congressional action and remained active at the end of FY2003. TEUC provides additional weeks of benefit eligibility to people who had exhausted their regular benefit amount. TEUC is a federally funded program. It paid out \$31,358,799 in benefits in FY03.

For FY03 (until September 30, 2003), the following are the parameters of the Idaho UI program that were in effect:

- **Minimum weekly benefit amount:**  
10/01/02 – 9/30/03 - \$51.00
- **Maximum weekly benefit amount:**  
10/01/02 – 6/30/03 - \$316.00  
7/01/03 -- 9/30/03 - \$320.00
- **Minimum weeks of benefits, regular program:**  
10 weeks
- **Maximum weeks of benefits, regular program:**  
26 weeks
- **TEUC weeks of benefits: one-half of regular program eligibility**

The weekly benefit amount and number of weeks of benefit eligibility can vary for each claimant depending upon each claimant's work and wage history.

FYI Table 1 shows the common measurements of the UI benefits program for the last five federal fiscal years. FY03 established new highs in the program magnitude dimensions. Idaho suffered through its economic slowdown throughout the fiscal year and there simply were more claimants. However, there was a decline from FY02 in the average weeks of individual claims and the average benefit amount. There is not any apparent explanation for this at this time.

FY Table 2 on page 22 shows the distribution of UI payments by county. The county indicates the claimant's residence, not necessarily the place where the claimant worked.

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FYI Table 1: Amount of UI Payments—All Entitlements—Total Idaho Instate

Fiscal Year	Number of Weeks Paid	Dollar Amount Paid	Individuals Receiving First Payment	Average Weeks Paid Per Individual	Average Weekly Benefit Amount
1999	529,960	\$97,736,895	44,932	11.79	\$184.42
2000	507,977	99,415,622	43,342	11.72	195.71
2001	610,282	127,757,865	51,160	11.93	209.34
2002	903,835	199,356,387	69,484	13.01	220.57
2003	934,767	205,955,268	74,923	12.48	220.33

FYI Table 2: Amount of UI Payments by County—All Entitlements—Federal Fiscal Year 2003

FIPS Code	County	Number of Weeks Paid	Dollar Amount Paid	Individuals Receiving First Payment	Average Weeks Paid Per Individual	Average Weekly Benefit Amount
1	Ada	220,135	\$52,681,089	16,038	\$13.73	239.31
3	Adams	6,181	1,389,967	483	12.80	224.88
5	Bannock	53,935	11,599,198	4,141	13.02	215.06
7	Bear Lake	2,895	675,489	239	12.11	233.33
9	Benewah	11,310	2,766,927	1,024	11.04	244.64
11	Bingham	24,559	5,095,806	2,356	10.42	207.49
13	Blaine	14,697	3,711,830	1,224	12.01	252.56
15	Boise	4,604	1,102,532	355	12.97	239.47
17	Bonner	35,374	7,546,523	2,909	12.16	213.34
19	Bonneville	36,177	8,254,220	3,066	11.80	228.16
21	Boundary	10,486	2,421,465	946	11.08	230.92
23	Butte	1,647	390,665	134	12.29	237.20
25	Camas	752	191,282	59	12.75	254.36
27	Canyon	139,171	29,691,949	11,160	12.47	213.35
29	Caribou	5,464	1,341,236	433	12.62	245.47
31	Cassia	18,140	3,431,635	1,463	12.40	189.18
33	Clark	430	101,328	44	9.77	235.65
35	Clearwater	9,758	2,301,314	799	12.21	235.84
37	Custer	3,359	752,570	270	12.44	224.05
39	Elmore	16,366	3,288,226	1,235	13.25	200.92
41	Franklin	2,035	417,752	178	11.43	205.28
43	Fremont	7,610	1,671,310	711	10.70	219.62
45	Gem	13,546	2,960,452	1,049	12.91	218.55
47	Gooding	7,217	1,492,458	578	12.49	206.80
49	Idaho	13,757	3,068,135	1,169	11.77	223.02
51	Jefferson	8,637	2,019,424	763	11.32	233.81
53	Jerome	10,600	2,203,039	870	12.18	207.83
55	Kootenai	84,566	18,019,487	6,787	12.46	213.08
57	Latah	12,578	2,978,774	1,026	12.26	236.82
59	Lemhi	7,157	1,460,730	570	12.56	204.10
61	Lewis	1,033	210,411	78	13.24	203.69
63	Lincoln	3,207	803,473	289	11.10	250.54
65	Madison	5,624	1,229,800	555	10.13	218.67
67	Minidoka	22,964	4,287,992	1,880	12.21	186.73
69	Nez Perce	19,087	4,105,997	1,564	12.20	215.12
71	Oneida	1,175	271,495	83	14.16	231.06
73	Owyhee	1,611	318,106	121	13.31	197.46
75	Payette	13,688	2,604,326	1,194	11.46	190.26
77	Power	6,675	1,377,868	654	10.21	206.42
79	Shoshone	16,983	3,670,627	1,425	11.92	216.14
81	Teton	1,844	444,521	169	10.91	241.06
83	Twin Falls	38,121	7,636,397	3,140	12.14	200.32
85	Valley	9,641	2,094,324	775	12.44	217.23
87	Washington	8,290	1,496,717	660	12.56	180.54
	Idaho Counties	933,086	\$205,578,866	74,666	12.50	220.32
	Unknown Counties	1,681	376,402	257	6.54	223.92
	Total Idaho	934,767	\$205,955,268	74,923	12.48	220.33
41045	Malheur Co., OR	3,599	674,617	349	10.31	187.45
53003	Asotin Co., WA	4,377	878,315	367	11.93	200.67
88888	Other Conti. Co.	9,807	2,268,412	792	12.38	231.31
99999	Interstate Liable	37,841	9,210,793	2,562	14.77	243.41
	Total Interstate	55,624	\$13,032,136	4,070	13.67	234.29
	Total Payments	990,391	\$218,987,404	78,993	12.54	221.11

Source: Idaho Department of Labor, Research and Analysis Bureau



eral more times, most recently last year when the state fell into a budget crisis and such projects were frozen. In May the Idaho Legislature, backed by Governor Dirk Kempthorne, approved the use of state bonds to finance the center and nine other building projects throughout the state. The multi-purpose activity center project is expected to take two years to complete and will be built in two phases. The completed center will include three full-sized basketball courts, weight-training rooms, seven classrooms, and the capacity to house large sporting and entertainment events.

- A ribbon cutting in September opened a new road in Lewiston's Business and Technology Park, marking the completion of infrastructure at the site. The one-mile stretch of Juniper Drive runs between Royal Plaza Care Center and the new Nez Perce Plaza shopping center. It winds past the site of Interventional Pain Consultants clinic, which will be the park's first tenant. The clinic, the practice of four Lewiston-Clarkston Valley anesthesiologists, is under construction. The business and technology park grew from Valley Vision's efforts to recruit new employers to the area. The project cost \$2.2 million,

with \$1.8 million provided by federal grants. The remainder was a mix of city, county, and port money. Juniper Drive now has three lanes, one each for northbound and southbound traffic, plus a turning lane and sidewalks on both sides. The infrastructure work included lines for water and sewer, and a conduit for high-speed fiber optic cable. Trees will be planted along paths and throughout the park to create a pleasant setting for workers and visitors. Interventional Pain Consultants will employ between 12 and 15 people. Although plans have been delayed several times, Regence BlueShield of Idaho also plans to locate there with as many as 500 workers, representing a mix of employees who will move from another Lewiston location and people hired for new positions. The latest plan calls for Regence's 55,000-square-foot building to open in the summer of 2005.

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**Southeast Idaho News** — *(continued from page 18)*

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clinic, a photocopy business, and an optometrist—have committed to lease space at the business park, and developers hope to attract three other businesses.

**Caribou County**

- A grand opening celebration was held for Xpress Cash's new office in Soda Springs. The office is located at 316 West Second South and offers payday and title loans and check cashing services.
- The U.S. Bureau of Land Management approved Agrium's expansion plan at North Rasmussen Ridge, a phosphate mine located northeast of Soda Springs. Agrium plans to extend their mine operations to the north onto U.S. Forest Service and state property. The approval includes reclamation of the Central Rasmussen Ridge Mine.

**Oneida County**

- The Oneida County Library's remodeling project, which began in the spring of 2002, was completed

this summer. Projects recently completed were the addition of new countertops, storage, sod, and a sprinkling system, and removal and resurfacing of the parking lot asphalt.

**Power County**

- After 35 years of business in American Falls, Larsen's Paint & Glass will close. The business will conduct a liquidation sale and final closing of the store will occur within a few weeks. The store is closing because owners John and Carma Larsen are retiring.

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# Glossary of Labor Market Terms

**Agriculture Employment:** Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

**Average Hourly Earnings/Average Weekly Hours:** The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12<sup>th</sup> of the month.

**Average Weekly Earnings:** Average Hourly Earnings multiplied by Average Weekly Hours.

**Civilian Labor Force:** A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

**Consumer Price Index (CPI):** A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

**Covered Employers:** Employers who are subject to state and federal Unemployment Insurance laws.

**Durable Goods:** Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

**Employed:** Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12<sup>th</sup> day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

**Initial Claim:** Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

**Labor Market Area (LMA):** An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

**Metropolitan Statistical Area (MSA):** An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d'Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

**Nonfarm Wage & Salary Employment:** Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12<sup>th</sup> of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

**Nondurable Goods:** Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

**Seasonally Adjusted:** Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

**Unemployed:** Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12<sup>th</sup> of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

**Unemployment Insurance:** Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

**Unemployment Rate:** The number of persons unemployed expressed as a percentage of the labor force.

**Weekly Benefit Amount:** The amount payable to a claimant for a compensable week of total unemployment.

**Weeks Claimed:** The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

**Weeks Compensated:** The number of weeks for which compensation was actually paid.